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ABSTRACT

Problems encountered in the first seven years of operation of the Interlibrary Delivery System (IDS) for the transport of interlibrary loan materials among libraries in Pennsylvania prompted this study of present delivery at the local and state levels, with the objectives of evaluating benefits, costs, routing, funding, and governance of delivery systems. This report describes the development of IDS, evaluates its current operations and costs in comparison with those of the U.S. Postal Service and other commercial carriers, and evaluates the feasible alternatives to IDS. The major recommendations are that IDS should be retained with much of its present structure, but that an annual appropriation should be sought from the state legislature to subsidize the service in lieu of LSCA funds, giving it the stability in funding which it needs for sound planning and development. Data collected through on-site visits, interviews, and questionnaires are presented in 27 tables, and maps showing the various systems, delivery areas, and routes are provided. (Author/JVP)

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FINAL REPORT

on

THE ALTERNATIVES FOR DELIVERY OF MATERIALS BETWEEN PENNSYLVANIA LIBRARIES

to

THE STATE LIBRARY OF PENNSYLVANIA
Harrisburg, Pennsylvania

February 23, 1979

by

Michael B. Wessells
Beverly A. Rawles
Ann M. Walker

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Patricia M. Broderick

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

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Columbus Laboratories
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TABLE OF CONTENTS

	Page
EXECUTIVE SUMMARY	i
INTRODUCTION	1
Objectives of the Study	1
Methodology	3
Acknowledgments	4
HISTORICAL DEVELOPMENT	5
INTERLIBRARY DELIVERY - PRESENT PRACTICE	15
Interlibrary Delivery in Other States	15
California	15
Connecticut	15
Nevada	19
New Hampshire	19
Indiana and Ohio	19
Vermont	20
Colorado	20
SUMMARY	20
Interlibrary Delivery in Pennsylvania	21
Interlibrary Delivery Service of Pennsylvania (IDS)	21
Local Delivery Services	26
THE LIBRARY VIEW OF DELIVERY SERVICE	28
Interlibrary Loan	29
SUMMARY	36
IDS	37

TABLE OF CONTENTS
(Continued)

	Page
SUMMARY	42
Local Delivery	43
SUMMARY	44
Costs	44
THE CARRIER VIEW OF DELIVERY SERVICE	47
Bus	47
U.S. Postal Service	47
United Parcel Service (UPS)	48
Purolator	49
IDS	49
Evaluation of Carriers	49
First Class Mail	51
DELIVERY ALTERNATIVES FOR PENNSYLVANIA	52
Alternative I	53
Management Structure	53
RECOMMENDATION	55
RECOMMENDATION	56
Funding	58
RECOMMENDATION	61
Membership Fees	62
Strengths of Alternative I	63
Weaknesses	64
ALTERNATIVE II	65
Costs	65

TABLE OF CONTENTS
(Continued)

	Page
The Western Libraries	66
Strengths of Alternative II	67
Weaknesses	68
ALTERNATIVE III	69
Description	70
Costs	69
Strengths	70
Weaknesses	70
ALTERNATIVE IV	71
Description	71
Costs	71
Management	73
Strengths	73
Weaknesses	74
ASSESSMENT	75
RECOMMENDATION	76
APPENDIX	A-1

LIST OF MAPS

Map 1.	District Library Centers - Public Library System	6
Map 2.	Delivery Area - ACLCP	8
Map 3.	IDS Routes 1975-1978	12

LIST OF MAPS
(Continued)

Page

Map 4. Interlibrary Delivery Service of Pennsylvania Present Routes 22

Map 5. Local Delivery Patterns 46

LIST OF TABLES

Table 1. Growth of IDS 10

Table 2. Number of IDS Members 11

Table 3. State Libraries Supporting Cooperative Delivery 16

Table 4. Exchange Points Between Routes 23

Table 5. Traffic Between Routes 24

Table 6. Type of Library Responding 28

Table 7. Size of Library Responding 29

Table 8. ILL Volume Among Responding Libraries . . 31

Table 9. Type of Library Used Most Often for Requests by IDS Members 32

Table 10. Type of Library Used Most Often for Requests by Non-Members of IDS 33

Table 11. Type of Library to Which Items are Most Often Sent by IDS Members 33

Table 12. Type of Library to Which Items are Most Often Sent by Non-Members of IDS 34

Table 13. Sources for Location 34

Table 14. Factors Seen as Most Influential in Selecting a Library fo an ILL Request . . . 35

Table 15. Location of Member Respondents by IDS Service Routes 37

LIST OF TABLES
(Continued)

		Page
Table 16.	Efficiency of IDS	38
Table 17.	Benefits of IDS	38
Table 18.	Funding	39
Table 19.	Governance	39
Table 20.	Reasons for Not Joining IDS	40
Table 21.	Changes that Would Encourage Joining	40
Table 22.	Statewide Benefits of IDS	41
Table 23.	Funding	42
Table 24.	Governance	42
Table 25.	Importance of Delivery	43
Table 26.	Staff Hours for Shipping	44
Table 27.	Costs of Delivery	45
Table 28.	Costs Per Route (1977)	65

EXECUTIVE SUMMARY

The State Library of Pennsylvania contracted with Battelle's Columbus Laboratories for this study of the Interlibrary Delivery System (IDS), a statewide service operating among libraries in Pennsylvania. The IDS is funded through fees charged to member libraries, and federal funds provided by the Library Services and Construction Act (LSCA) through the State Library. The total budget of IDS for 1977 was $134,012 of which $83,215 came from membership fees and $50,977 from LSCA.

IDS began operations in 1969. It grew from a membership of 35 in 1970 to 129 in 1978. It provides delivery of books and magazines among the libraries of Pennsylvania so that any person residing in the state can have access to the materials owned by Pennsylvania's public, academic, school, and special libraries. This means that no Pennsylvanian need do without the information needed for his/her education, job, recreation, or cultural pursuits. At the same time, the libraries of Pennsylvania share the resources they own; they do not have to duplicate expensive books and periodicals.

Pennsylvania has excellent libraries whose collections are invaluable to the state and the nation. For example, the Library of the College of Physicians and Surgeons in Philadelphia is an extraordinary resource of the state. This library plays a vital role in the health and welfare of the people of Pennsylvania and other states by sharing its rich research collection with medical professionals and other allied health industries. IDS is a link that moves the materials from this library to these people wherever they work in Pennsylvania.

Another example of an important service performed by IDS is the transport of motion picture films between libraries. The film center at the Pennsylvania State University furnishes films to libraries anywhere in the state, but if the center were dependent upon the mails or private carriers to transport the films, schedules might not be met and costs would increase tremendously. In 1977, IDS delivered 17,626 films to libraries in Pennsylvania as part of its regular delivery services. If these same films had been sent by mail, it would have cost approximately $8000. The extra cost is not as critical to libraries as the risk of missing schedules. Film programs in local communities are planned and publicized in advance. If the film does not arrive on time, the library must cancel the program and disappoint the people. IDS has performed a real service to libraries by assuring that the films are delivered on time and without damage.

As a statewide delivery system, IDS covers all geographic areas including the Northwest at Erie and the North Central at Mansfield. These are expensive routes to operate causing overall IDS costs to go up. Member libraries in such areas as these still pay the same fee as other libraries. The LSCA subsidy of federal funds provides the support to make this possible. It means the people of Erie and Mansfield have equal access to all of Pennsylvania's library resources, as much so as if they lived in Philadelphia. No other large state in the nation provides this service to its people.

The State Library of Pennsylvania and the governing Board of IDS recognize the value of a statewide delivery system to the state, yet they have a responsibility to assure that the federal monies which sustain IDS are justified, and to determine whether other state sources of support should not be sought to replace the federal funds.

LSCA funds are not intended to support operating expenses of an established library service year after year, nor is it wise to depend upon uncertain federal funds. For these reasons, this study was commissioned to evaluate IDS and to examine alternatives to it which the state might consider.

The pages that follow describe the development of IDS, evaluate its current operations and costs in comparison to those of the U.S. Postal Service and other commercial carriers, and evaluate the feasible alternatives to IDS. The major recommendation of this study is that IDS should be retained with much of its present structure but an annual appropriation be sought from the Pennsylvania Legislature to subsidize the service giving it the stability in funding which it needs for sound planning and development.

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from

BATTELLE
Columbus Laboratories

January 19, 1979

INTRODUCTION

Objectives of the Study

Libraries in recent years have become increasingly concerned with sharing resources with one another. Technological advances and increasing cooperative organization have enabled libraries to locate needed resources more quickly and efficiently. Location is, however, only one aspect of sharing resources. Some means must be found to transport materials from one library to another at a reasonable speed and cost. One solution is the United States Postal Service, but the availability of electronic bibliographic access tools and swift location devices have made the delays involved in using the USPS very frustrating.

In response to this perceived problem, some libraries have contracted with common carrier delivery services such as UPS or developed library-dedicated delivery services to link specific consortia or library systems.

Some of these services, such as in Connecticut or Vermont, have become statewide in scope; others, as in Colorado and Illinois, serve large substate regions.

Pennsylvania is the only geographically large state that has a statewide library delivery service. The Interlibrary Delivery Service of Pennsylvania evolved from a local delivery service for a consortium of college libraries in 1969 to a statewide library delivery service in 1975. This service interconnects several hubs of local delivery services or library networks with member libraries across the state.

The development of such a service is not without attendant problems. Routing, governance, and funding decisions must be made and acceptable trade-offs between cost-effectiveness and wide-ranging service must be determined. After seven years of rapid growth, the Interlibrary Delivery Service has had to face several disquieting prospects:

- the service has been forbidden to carry letter mail between member libraries (except interlibrary loan forms returning with a book), cutting off one of the features attractive to members
- the State Library of Pennsylvania has subsidized the service's growth (with Federal funds) since its inception, and now must take a careful look at whether this supplemental funding should continue
- membership seems to have leveled off and has even declined and future membership fee increases present the possibility of an even greater decline
- governance structure of the service has suffered from several recent and prospective changes in management responsibilities.

In late 1977, the State Library of Pennsylvania decided that a thorough study should be made of present delivery at the local and state levels, with the objectives of evaluating benefits, costs, routing, funding, and governance of delivery systems. Alternatives to existing services and establishment of new services were to be included where warranted. In mid-1978, a contract for this study was awarded to Battelle's Columbus Laboratories.

Methodology

In carrying out the study, Battelle examined delivery service from the viewpoint of libraries and of carriers:

- On-site visits were conducted at 17 libraries in Pennsylvania
- Interviews were conducted with 52 Pennsylvania librarians, representing 41 libraries.
- Interviews were conducted with librarians and state library agencies in 15 other states, including all states contiguous to Pennsylvania.
- A total of 676 questionnaires was sent to all members of the Interlibrary Delivery Service of Pennsylvania and 294 selected non-member libraries. Sample questionnaires will be found in Appendix I to this report.
- Interviews were conducted with two IDS drivers.
- Interviews were conducted with representatives of United Parcel Service, Purolator, the United States Postal Service, and local private delivery companies presently contracting for service with Pennsylvania libraries.

- Maps, documents and data were studied relating to interlibrary loan and delivery. These documents were provided by the State Library of Pennsylvania, the Interlibrary Delivery Service, and other libraries and institutions.
- Battelle staff attended meetings of the IDS membership and Board of Directors at the Pennsylvania Library Association conference in October 1978.

Acknowledgments

Battelle Columbus Laboratories would like to thank the many librarians and other persons in Pennsylvania and elsewhere who gave their time and knowledge for the benefit of this study. Particular appreciation is due to the following:

- The Advisory Committee appointed by the State Library of Pennsylvania to oversee the study: William E. Hough III, immediate past president, IDS Board; Patricia A. Dobbin, Montgomery County-Norristown Public Library; Gary D. Wolfe, Central Pennsylvania District; George H. Zook, Lancaster-Lebanon Intermediate Unit; Bro. James McCabe, Allentown College of St. Francis de Sales; Kathy Kennedy, People's Library, New Kensington, PA
- Stephen D. Wood, Supervisor-Adult Services, Cleveland Heights-University Heights Public Library, Ohio and coordinator of IDS from its inception in 1969 to 1977; (consultant for the study).
- David Reynolds, Coordinator of IDS, 1977-1978.

Special thanks are due to David R. Hoffman of the State Library of Pennsylvania for supplying information and advice throughout the study as Technical Monitor.

HISTORICAL DEVELOPMENT

In 1961-62, legislation in Pennsylvania established a system of district library centers, based on the recommendations of a 1958 study by Lowell A. Martin, Library Service in Pennsylvania Present and Proposed. These district library centers provide coordination and back-up services to local libraries within their districts. Services include specialized reference service, interlibrary loan, collection development programs, and extension and advisory programs. The state provides a per capita grant to the district library center for the provision of these services.[1] To support the district library centers, there are four designated resource libraries: The State Library in Harrisburg, the Carnegie Library of Pittsburgh, the Free Library of Philadelphia, and the Pennsylvania State University Library.

In conjunction with interlibrary loan services, many district library centers have provided delivery services among local libraries in their districts. For some years, however, there was no regular means of providing delivery among the district library centers themselves and between the district library centers and other types of libraries that might provide resources for interlibrary loan.

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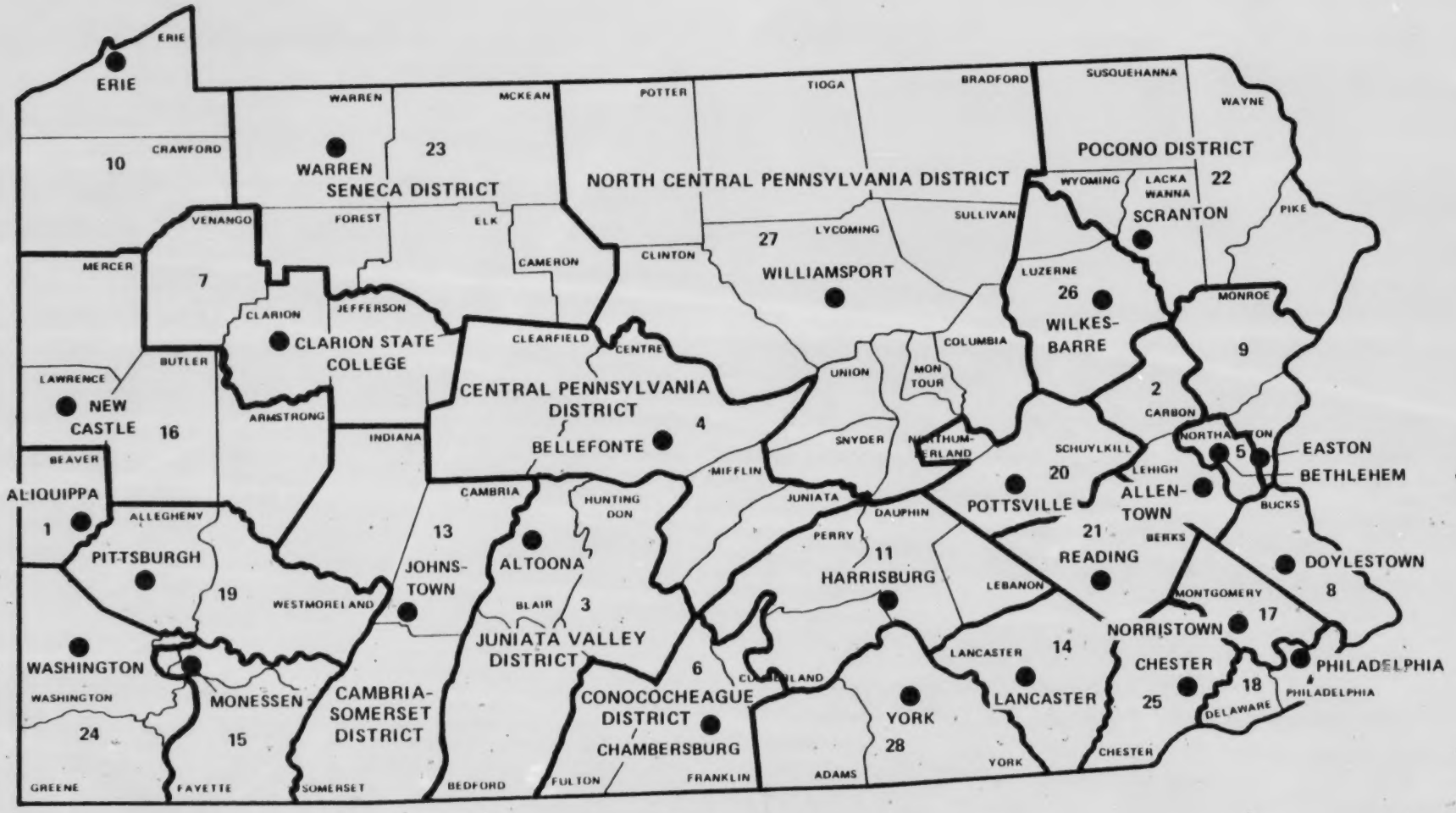
[1] William F. Donny and Francis J. Reardon, Evaluation of District Library Center System in Pennsylvania, Pennsylvania Department of Education, 1975.



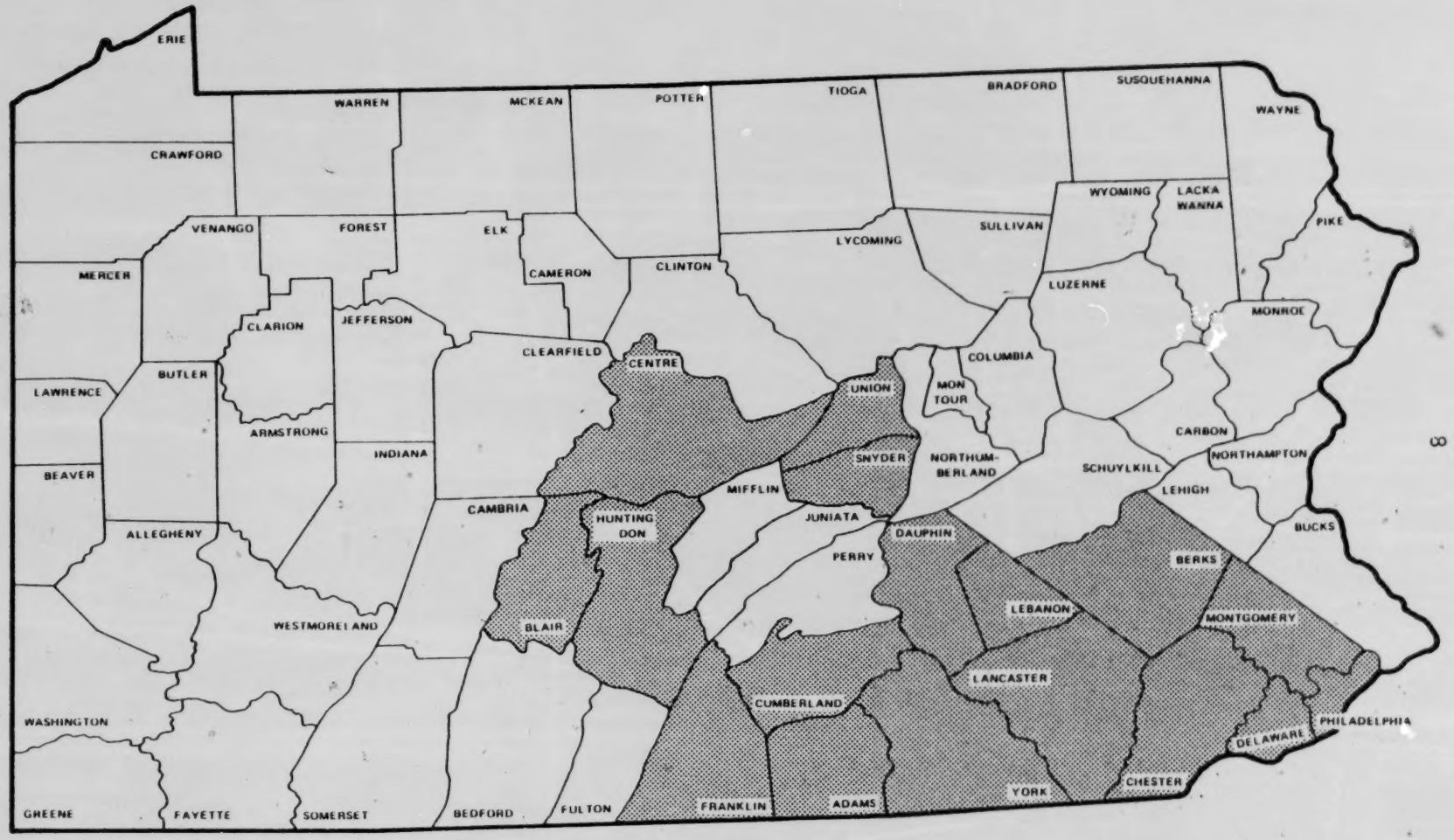
MAP 1
DISTRICT LIBRARY CENTERS
Public Library System

These other types of libraries were also organizing delivery services. In 1969, the Lehigh Valley Association of Independent College Libraries was formed, offering daily delivery among its six members.

During the evolution of these localized delivery services, one service slowly grew to encompass the entire state. In 1969, the Area College Library Cooperative Program of Central Pennsylvania (ACLCP), a consortium of 16 college libraries and the State Library of Pennsylvania, proposed an interlibrary loan delivery service, connecting members of the consortium with several libraries in the Philadelphia area, six district library centers in central and southeastern Pennsylvania, and several additional college libraries including Pennsylvania State University. In all, 37 libraries in 15 counties were linked on a single delivery circuit with an eastern and a western loop, offering service twice weekly from a single leased van. The ACLCP Delivery Service was funded by a combination of LSCA Title III ($7,000) and membership fees ($4,331) and administered by the Lancaster County Library, a district library center with several years of experience in operating a local delivery service.

The project which established the service was funded with a 1:2 ratio of local support to federal funds. The plan was to increase local support to a 2:1 ratio of local to federal money the second year and to total local support the third year. The second year of the project followed the proposed formula, using only $3,500 in grant funds and raising $9,731 through membership fees. Service volume grew to an estimated total of 30,000 items carried per year.

Encouraged by the volume of materials carried and the positive response of participating libraries, the ACLCP Delivery Service requested additional LSCA funding to support an expansion of service (See Map 2). A second



MAP 2
DELIVERY AREA – ACLCP

vehicle was added, membership expanded to 67 libraries by January 1973, and deliveries increased to three times per week. The name of the service was changed to the Interlibrary Delivery Service of Pennsylvania (IDS). Cost per member increased only $34, from $210 to $244, but the LSCA grant supporting the service rose to $17,400 out of a total budget of $36,500. The number of items carried more than doubled to 77,600.

The ratio of LSCA grant to membership revenue returned to approximately 1:2 in fiscal years 1973-74 as is illustrated in Table 1. Membership increased to 75 and items carried to more than 100,000.

The success of IDS at the substate level encouraged the Lancaster County Library to think in terms of offering the service on a statewide basis. With the help of a $9,000 LSCA planning grant, a plan for statewide service was developed under the leadership of Stephen D. Wood, coordinator of IDS from its inception in 1969 to 1977. Under the new plan, six trucks traveled intersecting routes, two each in east, central, and west Pennsylvania. Overnight service via Greyhound Bus Lines was instituted to facilitate speedy delivery between Harrisburg, Pittsburgh, and Philadelphia (See Map 3). Each of the six routes was managed by a different district library center. The initial managing libraries were: The B. F. Jones Memorial Library in Aliquippa, the David A. Glosser Memorial Library in Johnstown, the Dauphin County Library System in Harrisburg (two routes), the Chester County Library in West Chester, and the Bucks County Free Library in Doylestown. Overall coordination and fiscal control remained with the Lancaster County Library.

In order to encourage the broadest possible participation by libraries across the state, the State Library of Pennsylvania subsidized the individual

TABLE 1. GROWTH OF IDS

Year	LSCA Grant	Membership Fees	Total	Number of Members	Items Carried
1970	$ 7,000	$ 4,331	$ 11,331	35	27,646
1971	3,500	9,731	13,231	35	37,284
1972	17,400	19,102	36,502	67	77,610
1973-4	16,840	40,525	57,365	75	231,304
1974	9,071[1]	--	--	--	--
1975	130,100[2]	32,135	162,235	152	231,662[3]
1976	86,500	75,487	161,987	156	249,796[4]
1977	12,508	86,110	98,618	121	204,639
1978	38,289	84,960	159,221[3]	129	134,952[4]

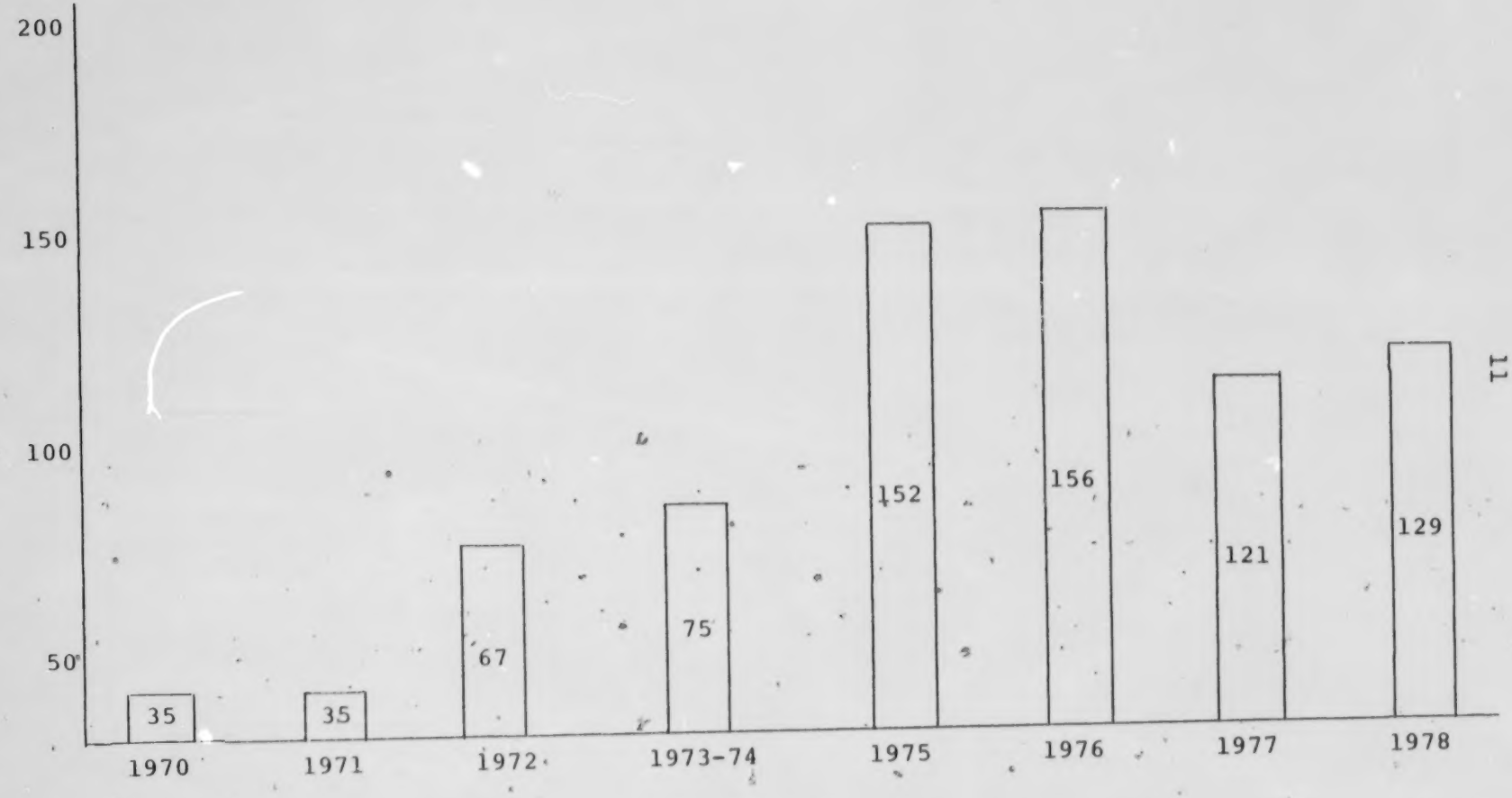
[1]Planning grant for preparation of statewide service plan

[2]Includes subsidy for membership fees for new members

[3]Includes interest income and carry-over from previous year

[4]January-October only. Projected figures for the year would total 161,942 items. Also not included are items sent from IDS Headquarters, an estimated 40,000 items

TABLE 2. NUMBER OF IDS MEMBERS



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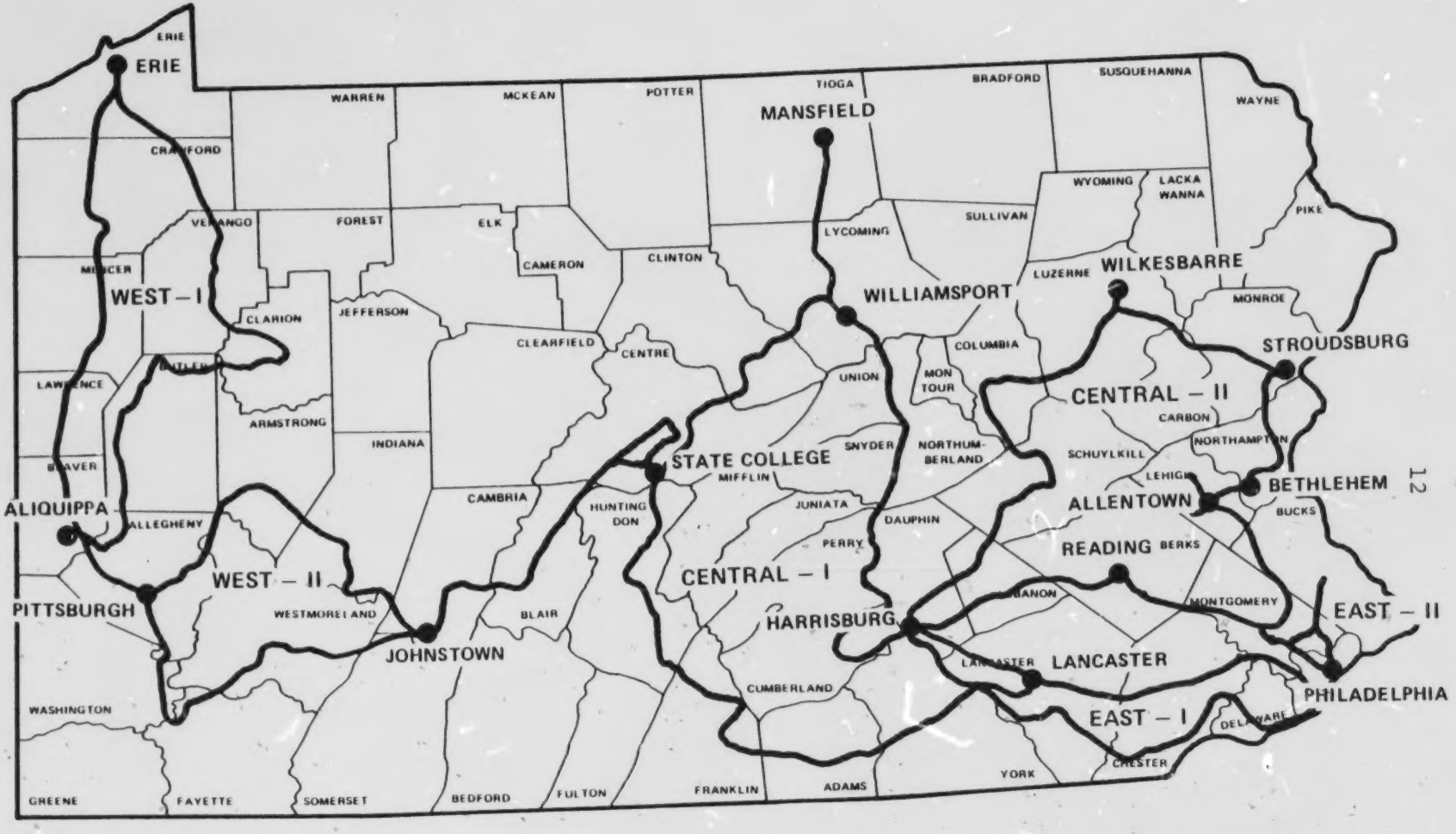


MAP 3
IDS ROUTES 1975-1978

membership of libraries for the first year. New members were required to make a two-year commitment, paying a fee of $200 for the first year and $400 for the second.

Under this policy, 152 member libraries used IDS after statewide service began in January 1975, generating membership fees of $32,135, supplemented by an LSCA grant of $130,100. The following year, the LSCA grant was $86,500 and membership fees generated $75,487. There were 156 member libraries. It was hoped that the service would grow quickly to become self-supporting. Toward this end, membership fees for 1977 were set at $800.

During 1976, IDS began to place its organization on a secure and independent footing as a non-profit corporation. Bylaws were passed and IDS was incorporated in 1977 under the leadership of a Board of Directors selected from member libraries.

The continuing growth of IDS was slowed thereafter by a number of factors: (1) opinions issued in 1976 by the Assistant Attorney General, Pennsylvania Department of Education and by the Assistant General Counsel, United States Postal Service specifically prohibited IDS from carrying materials that could be classified as letter mail. The question of postal regulations is discussed elsewhere in this report, but it is noteworthy that an attractive service of IDS was suddenly no longer available. (2) Several libraries that participated in IDS for two trial years at an average of $300 per year, no longer felt able to afford service at $800 per year. Even higher fee increases were seen as probable in the near future. Although the membership fee remained at $800 for 1978, it rose to $875 for 1979. (3) The organizational structure of IDS underwent a change of coordinator, a change of the headquarters library to the Dauphin County Library in Harrisburg, and a rearrangement of routes and schedules in an effort to attain the most

efficient service possible. This constant state of flux made it difficult for member libraries to be confident in the solidity and continuity of the service. (4) Total paying membership dropped from 149 to 122 in 1977-1978 with the possibility of further membership losses in 1979.

The history of statewide delivery in Pennsylvania, then, shows steady growth followed by recent setbacks. This study provides an assessment of alternatives to be used in planning for future development.

INTERLIBRARY DELIVERY-PRESENT PRACTICE

Interlibrary Delivery in Other States

While Pennsylvania is the only geographically large state in which a dedicated statewide library delivery service is operated, there are various types of delivery services throughout the country.

The ASLA Report on Interlibrary Cooperation 1978 identifies at least 15 state libraries which support some type of cooperative delivery. To indicate the range of services and structures, several examples are described below.

California

There are 15 cooperative library systems which cover all of California. Each of these offers delivery service to member libraries. The systems are funded with a combination of state, federal and local funds. The cooperatives are single-type (public) libraries but cooperate with various multi-type consortia throughout California. A "joint powers agreement" allows the formation of such cooperatives and provides for their governance. The California Library Systems Act of 1977 empowers the CLSA Board to operate a statewide delivery system, but that portion of the Act has not been funded by the legislature.

Connecticut

The "Connecticar" program began operation at the Connecticut State Library in 1975. The service operates on a daily basis serving approximately 234 libraries

TABLE 3. STATE LIBRARIES SUPPORTING COOPERATIVE DELIVERY

State	State Support	Federal Support		Other Support
		Title I	Title III	
Alabama				
Alaska	X			
Arizona			X	
Arkansas	X	X		
California	X	X		
Colorado	X			
Connecticut	X			
Delaware				
Florida				
Georgia				
Hawaii				
Idaho				
Illinois	X			
Indiana		X		
Iowa				
Kansas				
Kentucky				
Louisiana	X	X		
Maine				
Maryland		X		X

State	State Support	Federal Support		Other Support
		Title I	Title III	
Massachusetts	X			
Michigan				
Minnesota	X		X	
Mississippi				
Missouri				
Montana				
Nebraska				
Nevada		X		
New Hampshire	X	X		
New Jersey				
New Mexico				
New York	X			X
North Carolina	X			
North Dakota				
Ohio	X	X		
Oklahoma				
Oregon				
Pennsylvania			X	X
Rhode Island	X	X	X	
South Dakota				
Tennessee				
Texas				
Utah				

State	State Support	Federal Support		Other Support
		Title I	Title III	
Vermont	X	X		
Virginia				
Washington				
West Virginia				
Wisconsin				
Wyoming				
Puerto Rico				
Pacific Islands				
Virgin Islands	X	X		X

*From: The ASLA Report on Interlibrary Cooperation, 1978, 2nd Edition, Association of State Library Agencies.

including public, academic, law and state institution libraries. Currently, seven routes are in operation. The goal is twenty-four hour delivery service throughout the state utilizing the interlibrary loan process.

Nevada

There is one regional delivery service in southern Nevada governed by the Clark County Public Library and it serves Las Vegas and the surrounding county. It is a multi-type system and operates on an LSCA grant from the Nevada State Library.

New Hampshire

There are two delivery systems organized in New Hampshire. The State Library and the academic libraries are served by a twice weekly delivery service supported by local funds. An experimental service has been started in the central district to offer twice weekly delivery to the libraries in that district, funded with a combination of state and federal money. Both systems are multi-type in their membership.

Indiana and Ohio

These two states have similar regional delivery systems. Libraries in Indiana are members of Area Library Service Associations (ALSA) which are multi-type library cooperatives supported primarily by federal funds. In Ohio, public libraries are organized into multi-county cooperatives (MCC's) or an Area Library wervice Organization (ALSO) which are supported by a combination of federal and local funds. Plans of service outline the goals of the

organizations and the proposed services. All of the cooperatives in Indiana and three in Ohio offer delivery service within the regions. Four other Ohio cooperatives use UPS and Purolator for local delivery. In Ohio, decisions regarding services are made by an administering library (LSCA grant recipient) with advice from MCC Boards. ALSA's and ALSO's have independent legally constituted boards as governing bodies.

Vermont

The State Library of Vermont operates a statewide delivery service for its five regional libraries. It is supported by a combination of state and federal funds. One van and one driver services the entire state, spending four or five days in each region and then moving on to the next. This results in a five-week delivery cycle.

Colorado

Regional library systems funded by the state provide delivery service to public and academic libraries in their region, and may contract to serve both special libraries in for-profit organizations and libraries in adjoining regions. These contracts may be based on flat fees or graduated fees for service based on volume of traffic sent.

SUMMARY: Several states offer examples of successful delivery services at the substate or small state level. Pennsylvania remains the single example in the nation for statewide delivery on a large geographical scale.

Interlibrary Delivery in Pennsylvania

Interlibrary Delivery Service of Pennsylvania (IDS)

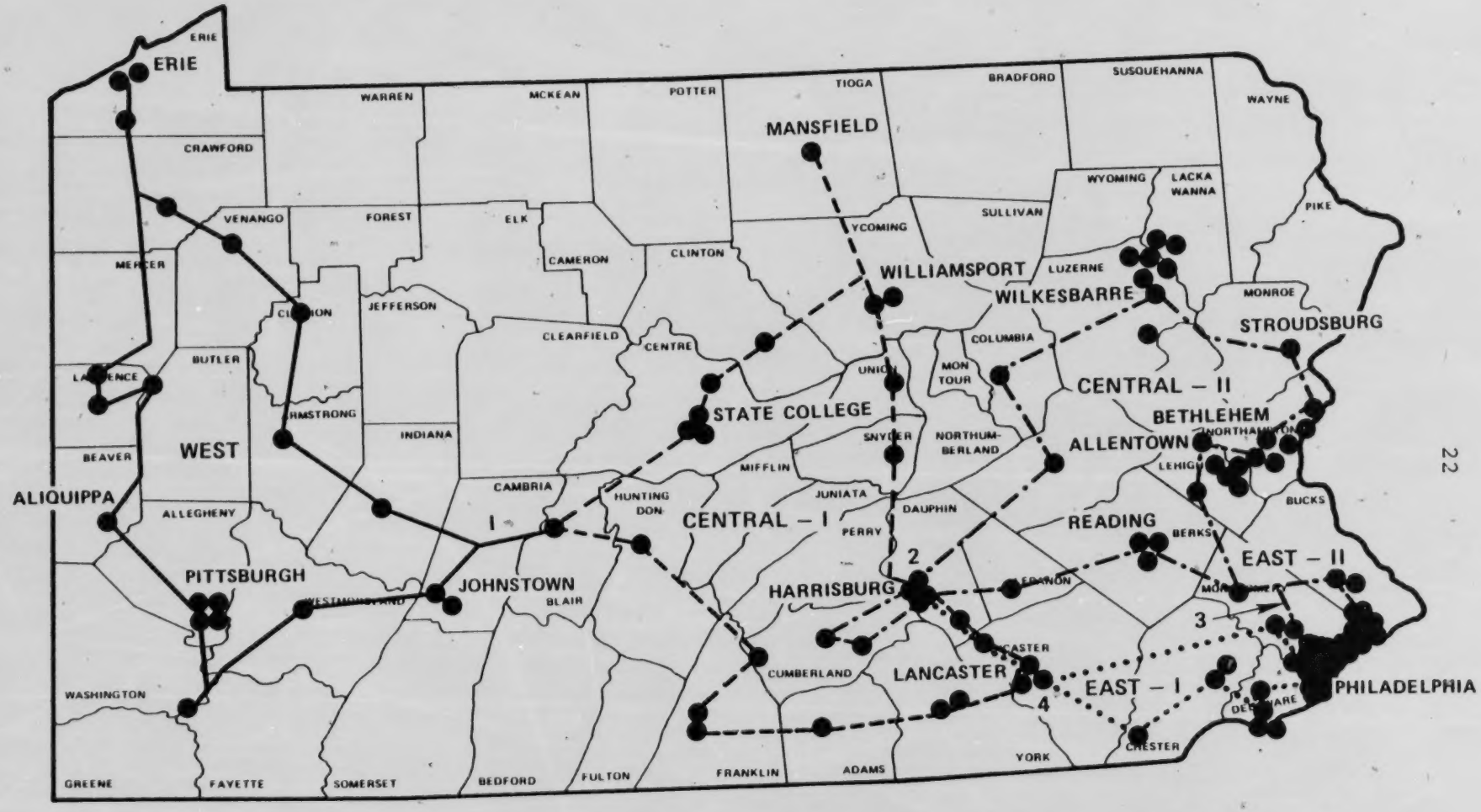
The historical development of IDS has been described above, but the development process never ceases--since the beginning of this study in mid-1978, IDS has undergone a fee increase, a major route restructure, and a change of coordinators. This section will describe the service as it presently functions.

IDS is an incorporated not-for-profit membership organization. Membership is open to district library centers, academic and special libraries, and library-related non-profit organizations. Service organizations whose participation would particularly benefit IDS members may be invited to join without membership fee. Examples of such members include the Pennsylvania Library Association, the Pennsylvania Library Network (PALINET), the Pittsburgh Regional Library Center (PRLC), and the College of Physicians in Philadelphia which serves as a major node of the national network of medical libraries, and performs a lending function only.

IDS is governed by a 12-member Board of Directors elected by the membership from among representatives of member libraries. The chief administrative officer is a coordinator selected by the Board and subject to its direction. In practice, this authority is delegated to the coordinating library.

IDS has no employees. The coordinator of IDS and all drivers of IDS vehicles are employees of the libraries responsible for the management of individual routes. Managing libraries are reimbursed by IDS for salaries and benefits of drivers, plus a specific amount for administrative costs.

There are five IDS routes and managing libraries as follows (See also Map 4):



1. West Route Manager – Johnstown
2. Central Routes Manager – Harrisburg
3. East II Route Manager – Ursinus College
4. East I Route Manager – Lancaster

MAP 4
INTERLIBRARY DELIVERY SERVICE OF PENNSYLVANIA
PRESENT ROUTES
129 MEMBERS

Route	Managing Library
East I	Lancaster County Library
East II	Ursinus College Library
Central I	Dauphin County Library/Harrisburg
Central II	Dauphin County Library/Harrisburg
West	Cambria County Library/Johnstown

To speed delivery from East to West, Greyhound Bus Lines is used for overnight delivery between Pittsburgh and Philadelphia. Drivers of the five IDS routes have established points of interchange between routes where materials can be dropped for later pick-up by the driver of another route. These exchange points are given below:

TABLE 4. EXCHANGE POINTS BETWEEN ROUTES

Exchange Point	Routes Interfacing	Days
Harrisburg	Central I and II East I	MWF
Ebensburg	Central I West	TThS MWF
Norristown	East I and II	MWF
Ursinus College	Central II and East II	MWF

During the most recent year for which such statistics have been tabulated (1976), traffic between routes was as follows:

TABLE 5. TRAFFIC BETWEEN ROUTES

Area of Origination	Area of Delivery	Number of Items
East	East	9647
East	Central	6614
East	West	1550
Central	East	5425
Central	Central	8254
Central	West	2318
West	East	1260
West	Central	2330
West	West	2848

This table does not reflect all the traffic carried by IDS during the year, but only the traffic for which routing statistics were compiled. Total traffic in 1976 was more than twice the figures reflected in this table.

Traffic between the extreme ends of the state was smallest of all combinations. Traffic among eastern libraries and traffic among central libraries generated the highest totals, followed by traffic between east and central libraries.

Drivers are employees of their respective managing libraries, with the exception of the East II driver, who is employed by the Lancaster County Library. This gives IDS the advantage of simplicity in record-keeping, but allows for no standardization in driver salaries and benefits, since these must follow policies and salary schedules of the individual managing libraries.

Member libraries pay the same annual fee, which was $875 in 1979. Each member library receives pick-up and delivery service three times per week. An additional option at one time existed for "piggy-backing" on an existing member library--IDS makes its

regular stop at the member library while other neighboring non-member libraries send and receive books through the member library's stop. Each non-member library served at a given stop pays a piggybacking fee of 15 percent of the full member fee. Although this option is no longer available, those libraries who had participated as piggybackers have been allowed to continue. Currently there are only three piggybacking operations: the six members of the Lehigh Valley Association of Independent Colleges (LVAIC) piggyback on a single IDS stop at Allentown. LVAIC then operates a daily local delivery to carry materials to and from the individual institutions. A similar interface with a local delivery service operates in Wilkes-Barre, where IDS serves Scranton and Wilkes-Barre libraries through a single stop at the Northeastern Pennsylvania Bibliographic Center at King's College. Norristown State Hospital is served as a piggybacker on the District Library Center in Norristown.

IDS members numbered 129 in 1978, of which 108 paid the full fee of $800, 14 paid a piggybacking fee of $120, and the remaining seven did not pay a membership fee. Four members have indicated that they will leave IDS with establishment of the new fee of $875 mandated by the Board for 1979. Even with the raised fees, IDS will require subsidy from the State Library of Pennsylvania to meet its budget for the coming year.

IDS offers member libraries services beyond the carrying of interlibrary loan materials. The speed and routing of IDS enable members to book and receive films from the statewide film center at Pennsylvania State University with assurance that films will be delivered on time. The IDS vans will carry any materials, except first class mail, that libraries want

to send to one another. A particularly useful program facilitated by the service is the exchange of duplicate copies of books and magazines. Member libraries can send each other large cartons of duplicates for exchange without incurring the heavy costs of shipping them by mail or freight. These are not priority items and are carried as space is available on the truck.

Local Delivery Services

Many areas of Pennsylvania supplement IDS with local delivery services. Some of these are connected with local consortia as in the case of the Lehigh Valley Association of Independent Colleges. Others are offered as part of a package of services from a district library center (DLC). Of Pennsylvania's 28 DLC's, 20 offer delivery services in all counties served and one offers delivery in only two counties served. Seven have no local delivery service. Of the DLC's offering delivery, four offer daily service, three offer service three times weekly, four offer twice weekly service, seven offer weekly service, and three offer a combination of schedules. The Free Library of Philadelphia operates delivery service in the city; it also contracts for delivery service for the county. The Conococheaque District Library also contracts from a private carrier for delivery service.

In certain areas of Pennsylvania, local delivery services interface with one another to the mutual benefit of each group. Local delivery services in Scranton and Wilkes-Barre link with each other, and also with IDS. Some local delivery operations exist side by side with school delivery services offered by the local intermediate

unit, but no formal interface occurs. Only the Lancaster Lebanon Intermediate Unit serves local public libraries in addition to serving schools.

DLC's with local delivery service are all members of IDS. Thus, the library resources of the Commonwealth are linked together to provide quick access for all Pennsylvanians.

THE LIBRARY VIEW OF DELIVERY SERVICE

To obtain the views of Pennsylvania librarians toward interlibrary loan and specifically, interlibrary delivery in support of these loans, we conducted extensive interviews with 52 librarians and visited 17 libraries in Pennsylvania. In addition, we sent questionnaires to all 129 IDS members and 294 selected non-members. Questionnaires were sent to both library directors and to interlibrary loan librarians at each library. Responses were received from 102 member libraries, a response rate of 79 percent and from 108 non-member libraries, a response rate of 37 percent. Of the public libraries in Pennsylvania, only the 27 district library centers (DLC's) were queried. Though all public libraries are eligible for membership in IDS, only DLC's are encouraged to join because they are the only public libraries charged with the responsibility of interlibrary delivery. School libraries were not queried. Responses by type and size of library are given in Tables 6 and 7. [In comparative tables, the sign (M) will designate IDS member libraries, the sign (N) will designate non-member libraries. The sign (n) designates the total number of respondents answering the question .

TABLE 6. TYPE OF LIBRARY RESPONDING (PERCENT)

Type of Library	Percent of Respondents (M) n=102	Percent of Respondents (N) n=102
Academic	62	48
Public (DLC)	22	4
Special-Medical	8	27
Other Special	6	14
Other Type	2	7

Note: Percentages of respondents match closely the percentages of the IDS membership as a whole.

TABLE 7. SIZE OF LIBRARY RESPONDING (PERCENT)

Volumes Held	Respondents (M) n=102	Respondents (N) n=102
0 - 5,000	0	25
5,001 - 25,000	4	24
25,001 - 50,000	8	12
50,001 - 100,000	19	16
100,001 - 500,000	58	21
500,001 - 1,000,000	6	2
1,000,000+	5	0

Most member libraries are the larger academic libraries, as is reasonable, since these libraries would generate interlibrary loan traffic sufficient to justify the membership fee. Only 27 public libraries are eligible to be members of IDS; of which 24, or 89 percent, are members.

Non-member respondents are smaller libraries with a heavy representation of special libraries, particularly medical libraries.

Interlibrary Loan

The need for interlibrary delivery depends heavily on the pattern of interlibrary loans among libraries. Several questions were asked of IDS member and non-member libraries to determine this pattern in Pennsylvania.

Librarians were asked to give the volume of interlibrary loan traffic they handled. Table 8 gives the responses broken down by type of transaction. It will be seen that member libraries show a much greater volume of interlibrary loan than non-members, as would be expected, since they are, on the whole, larger libraries.

These large libraries lend such a high volume of items to both IDS members and non-members that it inflates the average number of items lent by all libraries. Actually, only about one-third of the libraries who responded to the questionnaire lend more than they borrow. The other two-thirds are net borrowers.

These figures must be treated with further caution. There is no reason to believe that all libraries count items and transactions in exactly the same way or for the same period of time. Several libraries reported total ILL figures as in-state, giving no separate count of out-of-state traffic. Many libraries did not keep separate statistics for types of materials loaned and borrowed.

There is no central repository for gathering annual statistics for interlibrary loan for all types of Pennsylvania libraries. A bibliographic access study just being completed by Alexander Strasser of the Pittsburgh Regional Library Center should provide information on this matter. At present, only statistics for district library centers (DLC's) are maintained at the State Library in Harrisbrug. These figures show that 60-95 percent of interlibrary loan traffic sent by DLC's is sent to local public libraries for which the DLC is responsible.

TABLE 8. ILL VOLUME AMONG RESPONDING LIBRARIES

M = IDS Member Libraries
N = IDS Non-Members

Mean = Average of Responses
Median = Point at Which Half the Responses are Higher, Half Lower

	Mean (M)	Mean (N)	Median (M)	Median (N)
Total loaned in-state	2360	463	457	37
Books loaned in-state	1287	162	286	9
Photocopies sent in-state	1164	275	108	13
Films loaned in-state	546	106	--	--
Total borrowed in-state	896	232	634	90
Books borrowed in-state	569	62	315	30
Photocopies requested in-state	623	182	231	45
Films borrowed in-state	98	23	--	--
Total loaned out-of-state	428	30	30	3
Total borrowed out-of-state	182	29	64	10

Libraries were asked to report how many items had been sent through IDS during the past year (1977). Member libraries sent an average of 1108 items and received an average of 500 items. This discrepancy is partially accounted for by the fact that many libraries do not keep statistics on items received, but only on items sent. In addition, several libraries apparently reported total IDS traffic, in-going and out-going, under items sent. Approximately 30 percent of the responding libraries report shipping more than 1000 items a year by IDS.

Libraries were asked to indicate the type of library they send to and request from most often. Tables 9 through 12 show that both lending and borrowing are most often between libraries of the same type. The inter-type traffic most often involves loans by academic libraries to other types of libraries.

TABLE 9. TYPE OF LIBRARY USED MOST OFTEN FOR REQUESTS BY IDS MEMBERS (NUMBER INDICATES THE NUMBER OF IDS MEMBER RESPONDENTS WHO USE THE TYPE OF LIBRARY MOST OFTEN)

Type of Member	Type Used			
	Academic	Public	School	Special
Academic	61	1	1	1
Public	3	18	0	0
Special	6	0		7
Other	1	1	0	0

TABLE 10. TYPE OF LIBRARY USED MOST OFTEN FOR REQUESTS BY NON-MEMBERS OF IDS (NUMBER INDICATES THE NUMBER OF IDS NON-MEMBER RESPONDENTS WHO USE THE TYPE OF LIBRARY MOST OFTEN)

Type of Non-Member	Type Used			
	Academic	Public	School	Special
Academic	47	0	1	1
Public	0	0	0	0
Special	8	1	3	0
Other	4	0	0	0

TABLE 11. TYPE OF LIBRARY TO WHICH ITEMS ARE MOST OFTEN SENT BY IDS MEMBERS (NUMBER INDICATES THE NUMBER OF IDS MEMBER RESPONDENTS WHO USE THE TYPE OF LIBRARY MOST OFTEN)

Type of Member	Type Sent to			
	Academic	Public	School	Special
Academic	56	3	2	2
Public	1	20	0	0
Special	3	0	0	11
Other	0	2	0	0

TABLE 12. TYPE OF LIBRARY TO WHICH ITEMS ARE MOST OFTEN SENT BY NON-MEMBERS OF IDS (NUMBER INDICATES THE NUMBER OF IDS NON-MEMBER RESPONDENTS WHO USE THE TYPE OF LIBRARY MOST OFTEN)

Type of Non-Member	Type Sent to			
	Academic	Public	School	Special
Academic	34	7	1	4
Public	0	4	0	0
Special	4	0	0	37
Other	3	1	0	1

The source most often used to determine locations of books was OCLC for member libraries and union lists for non-members. Detailed figures are given in Table 13. Figures will reflect the fact that most of the larger libraries are members of OCLC, and that OCLC does not provide location information for magazines, which requires the use of printed union lists.

TABLE 13. SOURCES FOR LOCATION

Source	Number of Libraries Using Source Most Often (M)	Number of Libraries Using Source Most Often (N)
PALINET (OCLC)	1	1
PRLC (OCLC)	1	4
ULC	9	10
Other Union List	21	29
OCLC	48	25
NEPBC	5	2
Hit or Miss	2	7
Other	10	13

Once locations are identified, several factors influence where a library will send a request for a loan. The most influential factors are summarized in Table 14.

TABLE 14. FACTORS SEEN AS MOST INFLUENTIAL IN SELECTING A LIBRARY FOR AN ILL REQUEST

Factor	First Place Votes (M)	Second Place Votes (M)	First Place Votes (N)	Second Place Votes (N)
Library location	36	21	19	34
Library type	15	8	34	21
Previous ILL experience with library	14	31	17	20
Balanced borrowing among libraries	3	8	3	7
IDS membership	15	15	2	-
Fees involved	4	5	3	1
Consortium membership	16	5	15	2
Other	1	6	5	-

The most important selection criterion for IDS members was library location followed by previous ILL experience and IDS membership. Non-member libraries, showing the influence of the needs of special libraries, indicate that library type, library location, and previous experience are the most important criteria for selection.

Both groups have open interlibrary loan philosophies with 78 percent of member libraries and 68 percent of non-member libraries viewing interlibrary loan as a service for any user need, rather than restricted to specific groups or types of material.

Seventy-eight percent of the members of IDS reported an increase in interlibrary loan traffic since becoming members. Of these, only 17 percent credited the increase primarily to IDS membership; 67 percent saw the increase as a result of OCLC.

A question specifically directed at district library centers and members of library consortia asked for the percentage of interlibrary loan requests from local libraries or consortia members that are filled within the district or consortium. The average percentage among IDS members was 63 percent; among non-members, 45 percent. Half of the members filled 65 percent or more of the locally generated requests within the district or consortium.

Non-member libraries were asked what percentage of their interlibrary loans are presently sent by mail. Forty-eight percent send all interlibrary loans by mail; another 32 percent send better than 90 percent of their interlibrary loans by mail. Only five percent report using UPS.

SUMMARY: Interlibrary loan is concentrated in the larger libraries, most of which are members of IDS. The largest part of the ILL traffic of libraries associated with local consortia or district library centers is at the local level and is a local delivery concern. Interlibrary loan traffic is increasing in conjunction with the growth of OCLC. Further technological advances in OCLC can be expected to result in even greater increases in interlibrary loan traffic. Library location significantly influences the selection of target libraries for interlibrary loan requests largely because of the availability of delivery systems to expedite receipt of the materials.

IDS

One hundred two members of IDS responded to our questionnaire. Table 15 shows their distribution by IDS service routes.

TABLE 15. LOCATION OF MEMBER RESPONDENTS BY IDS SERVICE ROUTES
n=99

Route Location	Percent of Respondents
East I	17
East II	11
Central I	16
Central II	25
West I	9
West II	8
No response	3

During their period of membership, 36 percent have seen service improve, while only three percent have seen a decline. Another 34 percent indicate that service has remained the same, 37 percent have seen improvement in some ways, decline in others.

More specifically, libraries were asked to rate the efficiency of IDS in three key areas. Results are summarized on the following page.

TABLE 16. EFFICIENCY OF IDS (PERCENT RESPONSE)
n = 99

	Very Inefficient	Inefficient	Efficient	Very Efficient
Meets posted schedules	12	8	54	26
Delivers materials to correct library	3	8	52	37
Does not lose materials	5	-	52	43

It is noteworthy that IDS schedules are not designed to indicate when the driver will actually arrive, but rather the earliest possible time for his arrival. If materials are ready for pick-up by that time, they will be assured of pick-up that day.

Members were asked to rank the three most important benefits of IDS.

TABLE 17. BENEFITS OF IDS (NUMBER OF LIBRARIES RESPONDING)

Benefit	Most Important	Second Most Important	Third Most Important
Savings in postage, supplies, and insurance	20	19	14
Staff time on ILL decreased	21	15	15
Easier access to member library collections	14	15	13
Speed of delivery	26	25	18
Increased interlibrary cooperation	13	15	17
Duplicate exchange	2	4	9
Other			3

It is apparent that speed, cost, and time savings are the most important factors of interlibrary delivery.

Members were asked to give their preferences for the funding and governance of IDS. Their response was supportive of the current arrangement, as indicated below.

TABLE 18. FUNDING
n = 94

	Percent
Member fee	3
State/federal	12
Combination of above	79
Other	3
No opinion	3

TABLE 19. GOVERNANCE
n = 90

	Percent
Present structure	66
Run by State Library	21
Other	5
No opinion	8

One hundred eight non-members responded to our questionnaire. They were asked why they were not members of IDS. There was no restriction on the number of reasons that could be checked, so the percentages will not total 100 percent.

TABLE 20. REASONS FOR NOT JOINING IDS
n = 106

Reason	Percent Response
Volume of interlibrary loan does not justify fee	69
IDS route does not meet my needs	11
Can see no advantages for my library in such a service	19
Interloan primarily to non-IDS members	18
Have never heard of IDS	11
Other	16

Asked what changes would encourage them to join IDS, non-members responded as follows:

TABLE 21. CHANGES THAT WOULD ENCOURAGE JOINING
n = 106

Change	Percent Response
Lower fee	41
Pro-rated fee	23
More frequent delivery	4
Assurance that IDS membership will not suddenly lead to a sharp increase in ILL requests to their library	9
Other changes	7
Would never join IDS	13

It will be noted that 64 percent of the respondents indicated that the fee structure of IDS was a primary barrier to their membership in the organization.

In a broader context, non-members were asked what benefits they saw for Pennsylvania in such a service as IDS:

TABLE 22. STATEWIDE BENEFITS OF IDS
n = 105

Reason	Percent Response
Fosters interlibrary cooperation in Pennsylvania	63
Provides equal access to bibliographic resources and so relieves the burden on major resource libraries	38
Helps link east and west in the state	34
No real statewide benefits	7
Other	8

Non-members were asked their opinions for funding and governance of IDS. Responses are given in Tables 23 and 24.

TABLE 23. FUNDING
n = 82

	Percent
Member fee	11
State/federal	20
Combination of above	38
Other	1
No opinion	30

TABLE 24. GOVERNANCE
n = 83

	Percent
Present structure	31
Private company	1
State library	22
Cease operating	2
Other	4
No opinion	40

SUMMARY: Responses to questions about IDS were positive from both member and non-member libraries. Members gave IDS high marks in efficiency and indicated general satisfaction with mixed funding and present governance structures. Non-members see statewide benefits from IDS; but their low level of inter-library loan is the primary reason that they don't belong to IDS. The volume of interlibrary loan does not justify the fee. With present

membership fee levels, and the low level of need, IDS may count on a stock of goodwill from non-members, but little prospect for expansion in membership from them.

Local Delivery

IDS members and non-members were asked whether they were served by a local delivery service. A total of 39 percent of member libraries (36 libraries) and 16 percent of non-member libraries (16 libraries) reported local delivery service.

Those libraries which do not have local delivery were asked how important it was to have a local delivery service available to link libraries in their immediate area. Results are given below.

TABLE 25. IMPORTANCE OF DELIVERY

	Percent Response (M)	Percent Response (N)
Very important	42	16
Somewhat important	28	40
Of little importance	18	32
Of no importance	12	12

As might be expected, those libraries already participating in IDS attached greater importance to local delivery than those who are not. However, 56 percent of the non-member libraries see local delivery as important.

There are few links between local delivery services in the state. Nineteen IDS members report interfaces between local delivery and IDS, but only one interface is reported with an intermediate unit (school) delivery service, and only four interfaces with other delivery services. Non-member interfaces are three with IDS, one with an intermediate unit, and seven with other delivery services. Several of these responses may refer to the same service links.

SUMMARY: Respondents rated local delivery services as important, but relatively few report participating in such services. Even fewer were aware of links that connect different types of libraries.

Costs

Members and non-members were asked to estimate the number of staff hours devoted to shipping packages. Results are given in Table 26.

TABLE 26. STAFF HOURS FOR SHIPPING
Mean = Average Median - Midpoint

Mean (M)	204	Mean (N)	69
Median (M)	100	Median (N)	20

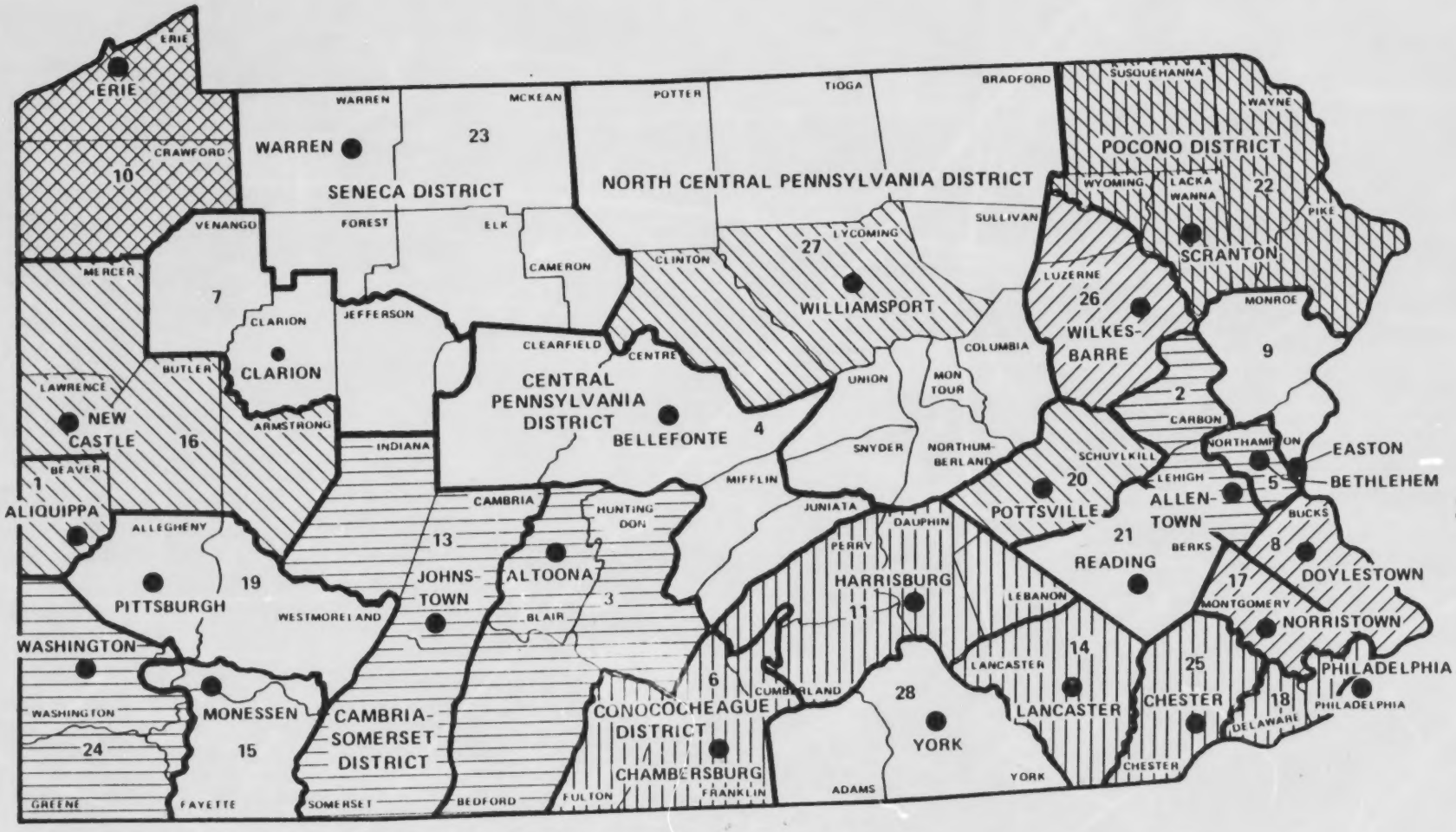
Members and non-members were asked to give the approximate dollar cost of different aspects of interlibrary delivery. Results are given in Table 27.

TABLE 27. COSTS OF DELIVERY (IN DOLLARS)
Mean = Average Median = Midpoint

Item	Mean Cost (M)	Mean Cost (N)	Median Cost (M)	Median Cost (N)
Postage	$735	$115	$150	$25
UPS	*	*	-	-
Supply	153	32	52	10

* Only two members reported--$100 each; four non-members reported $10, $15, or $25. One non-member reported $175.

These findings underscore the small scale of interlibrary loan by non-member libraries. The member libraries, even with IDS carrying part of the load, still incur significant costs in postage and supplies. (Areas where DLC's offer local delivery are shown on Map 5).



● Denotes supplementary or partial district library center service.

Daily Delivery

3 Day/Week Delivery

2 Day/Week Delivery

Weekly or Unscheduled Delivery

MAP 5
LOCAL DELIVERY PATTERNS

THE CARRIER VIEW OF DELIVERY SERVICE

The options for carriage of library materials in Pennsylvania include ground and air transportation. The location of Pennsylvania libraries makes it very clear that any transportation by air involves ground transportation from any air carrier to an individual library. The inconvenience and the costs of air transportation eliminate it as a viable option. Therefore, this examination is confined to ground carriers.

Bus

Greyhound Bus Lines serves major cities in Pennsylvania, but offers no door-to-door delivery for individual libraries. The particular value of bus service in the context of Pennsylvania library delivery is that Philadelphia and Pittsburgh are directly connected by IDS via overnight Greyhound service.

U.S. Postal Service

The Postal Service is the most commonly used carrier of materials between libraries. Postal rates are based on weight and benefit libraries in that 4th class library mail is given the lowest available rate: $0.14 for the first pound, $0.05 per pound up to seven pounds; $0.04 per pound thereafter. A five pound package sent anywhere in Pennsylvania, then, would cost $.34. These rates apply for films, sound recordings, and books. Beginning July 6, 1979, these rates will increase to $0.17 for the first pound, $0.06 per pound to seven pounds, and $0.05 per pound thereafter. One five pound package will then cost $.49 to mail. Present legislation has set annual increases for the library postal rate through 1987 at a rate of one to three cents per pound each year.

There are additional costs incidental to using the postal service. Packaging will be, at the minimum, a book bag, such as the Jiffy Bag, or a manila envelope for photocopies, for an average unit price for shipping materials of $.30 for books and $.09 for photocopies. The term fourth-class means that this mail moves under fourth priority, and, hence, is relatively slow. While test mailings were not performed, it is significant that speed of delivery ranked as the most important benefit of IDS as seen by IDS members.

In addition, postal regulations limit size and weight of packages. The size limit is 108 inches total length and width, and the weight limit is 70 pounds.

United Parcel Service (UPS)

United Parcel, like the Postal Service, delivers materials to any given address on a graduated scale of rates by weight. The difference is that UPS rates are much higher. The five-pound book which went by post for $.34 would cost $1.04 on UPS. While the Postal Service rates are constant no matter where the sender and recipient are located, packages between eastern and western Pennsylvania will cross over the UPS delivery zone line and incur a surcharge of approximately $.02 per pound.

The trade-off for higher cost is speed of delivery. Next day delivery can be expected anywhere within the originating half of Pennsylvania and 2-day delivery whithin the remainder of the state.

Package limits include a 50-pound limit per package and a limit of 100 pounds from one given location to another. Length and girth cannot total more than

108 inches. If they total 84 inches, the package is subject to a minimum charge equal to that of a 25-pound package.

Purolator

Purolator is, like UPS, a common carrier, offering service to any address on a scale of charges based on weight. The hypothetical 5-pound book on Purolator would cost $3.30 with guaranteed one-day service anywhere in Pennsylvania. Purolator rates are higher than UPS for comparable service. Package limitations are the same.

IDS

IDS delivers packages of any size to any member library. Costs are a flat fee of $875 which includes all the traffic a member library cares to generate. Books need not be wrapped, only tagged for delivery. Delivery time varies from same day to three days depending on the IDS routes on which the sending and receiving libraries are located. There are no weight and size limitations to packages. Any library in Pennsylvania is eligible to participate in IDS.

Evaluation of Carriers

In evaluating the choice of carriers, a library should consider two aspects of service, cost and speed, and estimate their value to library service.

Beyond a certain volume of items, no carrier can match IDS. At an annual cost of $875, IDS will provide

cheaper service than UPS or other common carriers at a volume of around 800 items. A library with a large film circulation will benefit even more from IDS because of its consistency in meeting schedules.

The break-even point is difficult to calculate without a knowledge of weights as well as number of shipments. A Plan for Library Cooperation in Pennsylvania (State Library of Pennsylvania, 1976) estimates a saving of between $300-$400 per year in mailing costs alone for IDS members. An additional savings of $375 is estimated for staff time spent in wrapping materials. Since books sent by IDS need no wrapping, a considerable savings can be realized. In a 1976 study of the IDS service option, the Lehigh Valley Association of Independent College Libraries found no significant cost differences between IDS and the U.S. Postal Service for a total traffic of 2370 items carried over six member libraries using the piggyback option. For a single library with a full fee of $875, this break-even point would equal 1354 items. This figure took no account of savings in labor through using IDS. These savings may be estimated at approximately $0.40 per item (based on eight minutes wrapping and labeling time by a clerk who is paid $3.00 per hour). If these savings are calculated into our equation, the break-even point is closer to 850 items.

In evaluation of carriers, cost is only one factor. Speed and reliability are other factors. Members give IDS high marks in reliability (See Table 16, page 38). Most members polled indicated that IDS delivery is faster than the U.S. Postal Service though a 1976 LVAIC study showed no significant advantage in speed for delivery

into the Lehigh Valley area by IDS, though reliability was greater with IDS. Informal statistics of the Northeast Bibliographic Center at King's College in Wilkes-Barre showed that in 1976, delivery by IDS varied from 3-5 days with the distance a book had to travel.

There are additional advantages to IDS for member libraries. These are treated in greater detail on pages 60-62.

First Class Mail

Until 1976, IDS carried first class letter mail between participating libraries as part of its normal service. In that year, the question was raised whether the carrying of such materials constituted a violation of laws permitting the monopoly of the U.S. Postal Service for carrying first-class letter mail.

In opinions issued by the Assistant Attorney General, Department of Education, Commonwealth of Pennsylvania and by the Assistant General Counsel, Opinions Division, Law Department, U.S. Postal Service, the ruling was rendered that letter mail could not be carried by IDS. Included in this prohibition were interlibrary loan request forms; unless traveling with a book.

These opinions are bolstered by two recent Federal court decisions in which private delivery services were restrained from carrying letter mail. The constitutionality of the statutory monopoly given to the U.S. Postal Service over the letter mail was upheld in both cases. [U.S. vs. Black 569 F.2d 1111 (1978) and U.S.P.S. vs. Brennan 574 F.2d 712 (1978)].

DELIVERY ALTERNATIVES FOR PENNSYLVANIA

We have described the historical background and present extent of interlibrary delivery services in Pennsylvania and surveyed the library and carrier views of delivery service. In this section of the report, we will discuss recommendations for future development of interlibrary delivery. This discussion is focused on four broad alternatives:

1) To continue the Interlibrary Delivery Service as a statewide delivery service under substantially the same structure that now exists.
2) To restrict the Interlibrary Delivery Service to central and eastern Pennsylvania on a more cost-effective basis; western libraries could individually contract for service or form a system in the west.
3) To replace the Interlibrary Delivery Service by contracted delivery or to return to the U.S. Postal Service or local and regional delivery services where operable and self-sufficient.
4) To expand the Interlibrary Delivery Service to include local delivery for the District Library Centers as well as statewide delivery.

Each of these alternatives was mentioned by Pennsylvania librarians as a possible future for interlibrary delivery. Each will be examined for strengths and weaknesses, implications for library development, and viability.

Alternative I

To continue the Interlibrary Delivery Service as a statewide delivery service under substantially the same structure that now exists. Under this alternative, IDS would evolve and change as need dictates.

Management Structure

The ad hoc nature of the historical development of IDS depended heavily on the management abilities and initiative of the first coordinator. Dependence on the personal qualities of a given individual can be a risk, for it is not always easy to find successors with the same qualities, especially at the salary offered for the coordinator's position. The Board of Directors has recently been taking steps to deal with problems that have arisen as a result of this ad hoc development. These problems include the following:

- A well-formulated, carefully studied marketing strategy for IDS has never been developed.
- There seems to be no clear-cut communications mechanism or lines of responsibility between member libraries, route managers, and the coordinator of IDS.
- Route planning, arrangement and structure outside of basic outlines often seem to be a matter for decision by drivers.
- IDS relies heavily on back-up services in staff time and substitute drivers from the route managing libraries without having, until recently, a full idea of the costs involved.

- Management must continually deal with the crisis situation of uncertain budgeting year to year.

There is no questioning the fact that IDS benefits from an able and active Board of Directors. For example, an ad hoc committee of the Board organized for Responsibility and Compensation for Management and Coordination (RACMAC), under the chairmanship of Robert Case, carried out a survey of route managing libraries and spelled out costs, as well as roles and responsibilities of IDS drivers, route managers, and the coordinator. A copy of the RACMAC Report will be found in Appendix 2. The committee recommended to the Board in September, 1978, several measures to tighten the operation of IDS:

- Place East II route management with Ursinus College.
- Reimburse route managing libraries $800 annually to manage an IDS route, with a contingency fund of up to $1200 to reimburse actual costs beyond that figure.
- Reduce the coordinator to 2/3 time on IDS.

Beyond these measures the Board is acting energetically to formulate a marketing plan and design publicity materials, including a newsletter, and to explore the possibilities of offering services to adjoining states. To all appearances, the Board of Directors is firmly acting as its own executive, with the coordinator serving in essentially a clerical capacity. To bring a full range of expertise to the solution of the management problems of IDS, this study recommends that the Board consider choosing (for membership) a non-librarian

specializing in transportation, business, or other areas central to a delivery service, but tangential to librarianship.

RECOMMENDATION: It is recommended that IDS Bylaws by amended to require at least one member of the Board to be drawn from outside the library community, preferably with transportation or related experience.

The coordinator of IDS is in an awkward position. By virtue of the visibility of his position, he is contacted by members who have any kind of question, even one that might be better handled by route managers. The greatest percentage of his time is spent on IDS business, while route managers and Board members have their own libraries to manage in addition to IDS responsibilities. The Board should regularize what is a de facto position, and work to centralize management of IDS around a strong manager whose full job is IDS. This coordinator would then perform many of the functions now allocated to the route managers, including the hiring and training of drivers, overall supervision and troubleshooting, payroll administration, and member liaison. All drivers could become employees of one library with an identical salary and benefits package even though their trucks may physically operate out of different libraries. Money presently allocated for route management could in part be reallocated to the support of the enlarged coordinator role.

Under this management plan, the present route managing libraries would serve as interchange points, provide basic stand-by troubleshooting and liaison with IDS headquarters. This would result in fewer IDS concerns for managing library administrators and more control for IDS headquarters over what is taking place with regard to the service.

A management arrangement of this nature would require an investment on the part of IDS, but should result in a tighter, more efficient service. Estimated costs of implementation are as follows:

Full-time coordinator-salary and benefits	$21,000
Administrative back-up	6,000*
Travel	2,000
	$29,000

*Some back-up services may be offered as an in-kind contribution of the administering library if compensating benefits for the administering library are apparent.

RECOMMENDATION: It is recommended that the IDS Board of Directors strengthen the position of IDS coordinator into a full-time central executive with most of the duties now held by route managers and, further, that the Board allocate the financial resources necessary to hire an individual with qualifications and experience sufficient for the job.

It is not necessary, of course, that IDS headquarters be physically located within a library. IDS could be headquartered in a separate office. This would enable IDS to be separated from the every day workings of another institution, and provide management stability independent of the ongoing willingness of a library to undertake the administering responsibilities. This advantage is outweighed by several disadvantages, however. Considerable expense would be incurred in renting separate facilities. In addition, there is widespread feeling that a library delivery service should be connected to a library.

More practically, the resources of a library can be of great benefit to IDS in terms of available space and possible back-up services and supplies, as long as the compensating benefits to the administering library are made very clear and are equitable.

The suggestion has also been made that IDS headquarters be located at PRLC in Pittsburgh. This would offer the following advantages:

- PRLC is now set up to offer numerous services to libraries in its service area other than simply OCLC cataloging services.
- Location in the west may serve to attract more membership from western libraries.

There are, however, disadvantages to this organization:

- Location in the west would remove IDS headquarters from close geographic proximity to the majority of members.
- Travel costs would rise as a result of this isolation.
- Difficulties may arise in the fact that the service areas of IDS and PRLC are different. The service areas of past administering libraries were included within the IDS service area. PRLC serves libraries outside Pennsylvania.
- Attitudes toward interlibrary delivery may be less positive in the west than in the east.

Though this suggestion does appear to have possibilities, IDS objectives probably would be best served if it maintained its headquarters in the geographic area of its greatest strength.

It has been suggested by many librarians that IDS should be run as a service of the State Library of Pennsylvania. This arrangement would centralize operations as suggested above and place the responsibility for an interlibrary cooperative service directly where many feel it belongs, on the shoulders of the state. This action is not recommended, however, for several reasons. First, state government is not set up to run a business. Second, it would bring all the disadvantages of government bureaus, such as hiring freezes, staff justifications, and layers of administration. More subtly, it would bind administrators fully to statewide service goals and actions and make more difficult the hard business decisions that may be necessary. Third, within state government, IDS would be only one of a number of services vying for the attention of top administrators. It is our judgment that service would not be improved by bringing IDS into the State Library. This does not mean that the state has no responsibility for the survival of IDS, however.

Funding

Though IDS was originally intended to become self-supporting, it is now clear that under the present structure, this is improbable. Membership fees now generate only 64 percent of the operating budget. The recent fee increase is already driving low-volume members out of IDS and it seems clear that the further 50 percent increase in fees needed to make the service self-sufficient would most likely create a domino effect among remaining members and lead to the total collapse of IDS. Though many seem hopeful that a large potential membership is only waiting to be recruited, our interviews with librarians in Pennsylvania and adjoining states give no evidence that a great potential for expansion exists. The easy

recruits are already in IDS and it will be a hard, persuasive sell that recruits many more.

Given this situation, it is very likely that IDS will require a subsidy each year it operates. The year-to-year crisis of petitioning for funding has caused service decisions to be made in an atmosphere of desperation. The IDS Board needs assurance that a subsidy will be given each year.

This assurance is difficult for the State Library to give. At present, the Pennsylvania Library Code does not allow expenditure of state funds for interlibrary cooperation. The only source of funding is LSCA Title III funds which have sustained the service, at least in part, since its inception. State Library officials are sensitive about the possible effects of using funds designated for experimental projects, as is LSCA, for funding ongoing operating costs over a period of several years. Federal regulations for LSCA do not prohibit this. In fact, several states use LSCA to fund ongoing projects of priority to the state. Another problem is that while Title III of LSCA is for interlibrary cooperation, Title I (Public Library Services) has a greater allocation of funds. In the case of IDS, however, it is difficult to see how Title I funds could be tapped for support of the service, except indirectly through individual district library centers. This possibility seems remote. Members of IDS (93 percent) and non-members (58 percent) think that state or federal funds should support the service in whole or in part. Pennsylvania librarians do see statewide benefits of a delivery service:

- Interlibrary cooperation and resource sharing between libraries is the one means whereby all Pennsylvanians can have access to the information they may need which may be located in another area of the state. The District Library and Resource Library Centers

are mechanisms set up by the state to facilitate this concept.

- IDS is seen as fostering interlibrary cooperation and resource sharing through increased speed and convenience of such sharing. A broader range of service capabilities for an individual library is seen as possible through rapid communication and exchange of materials.
- Libraries of different types and in different areas of the state are encouraged to think beyond local resources and utilize those of other geographical areas of Pennsylvania.
- Linking of east and west is seen as an important function of IDS.
- Funding at the state level has encouraged the development of technology enabling libraries to identify electronically the locations of many more resources than an individual library could own. The means of physically accessing these materials is seen as deserving a corresponding degree of development.
- State level funding has encouraged the development of major resource centers for providing materials to libraries in Pennsylvania. IDS is the most efficient means of making those materials available to library users across the state.
- Since the majority of IDS members are academic libraries, IDS serves to support the education of Pennsylvanians by improving their access to materials directly applicable to educational purposes but unavailable at their home institutions.

- A service including many smaller libraries tends to spread the lending burden across more libraries, lessening the heavy burden on a few large libraries.

Many libraries that are not members of IDS are aware of the statewide benefits described above. Only seven percent did not see any statewide benefits of the service.

In addition, IDS serves several libraries, such as Mansfield, that are so remotely located that no cost-conscious delivery service would serve them. The state should compensate IDS for the extra costs involved in providing services to remote geographical areas of the state.

If libraries are to work together to perform functions designed to better inform, educate, and serve the population of Pennsylvania, then state support should be available to the State Library for funding projects designed to achieve this function.

RECOMMENDATION: Legislation should be enacted to specifically permit the expenditure of state funds for purposes of interlibrary cooperation, and funds should be appropriated for such expenditure.

Until such legislation is forthcoming, the State Library should assure the continued funding of IDS with LSCA funds in order for it to remain operational. The service should not be expected to operate as a service organization, and to budget as a profit organization at the same time.

Membership Fees

IDS now has 125 members, of whom only 104 pay full fee, 14 continue to make use of piggybacking, and 7 are non fee-paying members. The major reason non-members give for not belonging to IDS is that the volume of interlibrary loan does not justify the fee. However, 38 percent indicate that a lower fee would encourage them to join, and 21 percent indicate that a pro-rated fee would encourage them to join.

Since the beginning of IDS, the membership fee has been a standard flat fee, identical for all full members. Several reasons exist for this arrangement:

- A pro-rated fee based on traffic volume would work to the disadvantage of the large libraries whose resources are the base for the entire service. A large library, then, would pay more as well as provide more resources.
- The present flat fee serves as a compensation to large net lenders for the use of their resources, where a pro-rated fee would penalize them.
- Costs of IDS are affected by geographical area and mileage factors, not by volume of business.

While IDS would not want to penalize heavy volume users who are net lenders, the low-income libraries that may need the service can least afford it. An option for enabling the participation of these libraries in IDS may be the establishment of a graduated fee for libraries with budgets falling below a given ceiling and retaining the standard fee for libraries with budgets above that

ceiling. The ceiling for small libraries could, alternatively, be based on volume of use. This would enable membership to grow among the small libraries.

An alternative fee arrangement could allow for less service at a reduced fee. For example, a small library might receive only one stop per week for a smaller fee.

Strengths of Alternative I

1. Strengthens access to information and materials for all Pennsylvanians by connecting resources throughout the state.
2. Enables a unified service to connect all types of libraries across the state in a delivery network dedicated to libraries.
3. Allows consistency, speed, and accuracy in library delivery through an effective closed system.
4. Enables member libraries to cut costs in postage, preparation, and packaging, thus allowing more efficient use of supporting funds.
5. Aids in the smooth functioning of a statewide resource sharing network to benefit all citizens.
6. Enables libraries in remote areas to receive effective delivery that would not be cost-effective for a profit-making carrier to offer at a similar price.
7. Allows the management of library delivery to be controlled by the libraries themselves.
8. IDS is already established and operating; a change would cause dislocations and delays.

9. Librarians favor IDS and like the services.
10. Gives the maximum amount of service for the money expended.

Weaknesses

1. Requires steady subsidy from the State Library, which is increasingly difficult for the State Library to provide.
2. Cost is beyond the means of several libraries who could use the service.
3. Permits no service improvement to local libraries whose DLC currently provides no local delivery.

ALTERNATIVE II

To restrict the Interlibrary Delivery Service to central and eastern Pennsylvania on a more cost-effective basis; western libraries could individually contract for service or form a system in the west.

Costs

The costs of a library delivery system are a function of mileage and number of stops. In a concentrated area containing a large number of libraries, a delivery system such as IDS can operate at a lower membership fee for participants. IDS could return to two route service (east and west) and operate with only a single managing library. Over 80 percent of present IDS members and 79 percent of IDS traffic are in the central or eastern routes.

IDS costs per route, as reported for 1977, leave no doubt that the least cost effective routes are in the west:

TABLE 28. COSTS PER ROUTE (1977)

Route	Membership Fees	Expenditures	Loss
East I	$20,920	$28,434	$ 7,514
East II	18,400	23,168	4,768
Central I	16,800	29,913	13,113
Central II	15,960	26,765	10,805
West I	8,000	24,764	16,764
West II	8,000	24,814	16,814

The elimination of service to the western libraries and the new membership fee of $875 would, if the membership remained constant in the east and central regions, give total figures for costs of $108,280, and income of $78,750, leaving a deficit of about $30,000. A fee of $1200 would be required to reach a break-even point. Some of the deficit may be eliminated through further cost parings within remaining routes, including the elimination of distant stops that are not cost-effective to serve (such as Mansfield). Even with restricted service, IDS may not be able to be self-sufficient.

This alternative is designed to indicate the probable effects of withdrawal of the present subsidy for IDS. In our judgment, the membership fees can never be high enough to support present service. Without the state and federal support, IDS must restrict service or cease operations altogether. This alternative shows the likely service design for a restricted IDS. Alternative III shows the design without IDS.

The Western Libraries

Under this alternative, delivery service in Western Pennsylvania would have to be provided in a way other than IDS. It is difficult to see any cost-effective alternative to IDS, other than the U.S. Postal service. It has already been demonstrated that western routes are the least cost-effective. There are fewer local delivery services. The Carnegie Library of Pittsburgh has found local delivery too expensive to provide. The local delivery service operated by the DLC in Erie has offered service to academic libraries but it was used very little by these libraries.

Two options remain for connecting western libraries with each other and with the rest of the state:

1) State or frederal support for individual libraries to be served on a contract basis by IDS
2) Development of a western delivery system

The first option would allow the smaller IDS to serve western libraries on a contract basis. The contract would recover the high costs of delivery in the west, in effect charging more to libraries that are more expensive, as a group, to serve. The end result may be a statewide delivery much the same as presently exists. The service to western libraries would be subsidized in part by federal funds through the State Library. Unless this arrangement would allow these support funds to be drawn from LSCA Title I, there would be no advantage over the present outright subsidy of statewide IDS service.

The second option would be the development of a separate delivery service by libraries in the west. One arrangement would be for PRLC to offer delivery as one of its services. Alternatively, service could be offered on a membership basis much as IDS originally developed. The paucity of western libraries and the distance and terrain between them, however, argue against the success of such a scheme. Any state funding would be more effectively used to subsidize IDS as it presently exists.

Strengths of Alternative II

1. May lead to a self-sufficient IDS.
2. Will allocate costs for delivery more equitably, with the libraries more costly to serve paying more or developing their own service.

3. May relieve the State Library of the burden of LSCA Title III funding for an ongoing service.

Weaknesses

1. Delivery service in Pennsylvania will be fragmented once more and a further wedge driven between east and west.
2. Statewide benefits of IDS will be lost and only regional benefits remain. The loser will be the library-poor areas of the west who may need most to be linked to other, stronger libraries.
3. There is no guarantee that IDS will be able to operate the service on a self-sufficient basis, even without the west.

ALTERNATIVE III

To replace the Interlibrary Delivery Service by contracted delivery or to return to the U.S. Postal Service or local and regional delivery services where operable and self-sufficient.

Description

In this alternative, IDS ceases to exist. All interlibrary delivery returns to the local level and operates where libraries can support service. The State Library removes itself from the support of large-scale interlibrary delivery, freeing Title III money for other uses.

Costs

For individual libraries, the cost of this alternative will be measured by the cost differences between the IDS fee and the costs of packaging and preparing materials and paying for their delivery by alternative means. Individual libraries must evaluate the service difference in terms of its worth to them.

For the State Library of Pennsylvania, the savings reflect those of Alternative II. No longer supporting delivery, except indirectly through the funding of DLC's, the State Library can apply LSCA Title III funds to other purposes.

An option for the State Library is to fund interlibrary delivery in some other way than a subsidy to a statewide delivery system such as IDS. For example, individual libraries could be reimbursed directly for

costs incurred in sending materials by UPS or other common carrier. To reimburse librarians for the volume of traffic now carried by IDS, in excess of 120,000 items per year, would cost the State Library more tban twice the present IDS subsidy. If the State Library is to fund interlibrary delivery in any fashion, the most cost-effective method is through subsidizing a service such as IDS.

Strengths

1. Would place the burden for delivery on the individual libraries who find it a priority and are willing to pay what it costs.
2. Would keep expensive delivery services at the local level where the majority of resource sharing takes place.

Weaknesses

1. All the benefits of a statewide service, as enumerated in Alternative I, would be lost.
2. This alternative, even more than Alternative II, would represent a psychological step backward for Pennsylvania libraries.
3. The volume of interlibrary loan may fall, especially from smaller libraries; the burden of loans that these libraries had carried may revert to resource libraries.
4. At the same time that technology, particularly OCLC, is making interlibrary loan more accessible bibliographically, this alternative would work toward hindering physical accessibility.

ALTERNATIVE IV

IDS expands to include local delivery responsibilities for the District Library Centers as well as statewide delivery.

Description

In this alternative, the Interlibrary Delivery Service operates independent local delivery routes based on the DLC's. Most probably, some DLC service areas could be combined into single routes. A statewide truck gives 3-day per week service to all the DLC's. Within the individual routes, all types of libraries are served. The intermediate units, academic libraries, and special libraries contract for service with IDS.

Costs

The costs for IDS would increase by more than 300 percent but IDS would gain some benefits from economies of scale, particularly at the local level. A promotional effort could demonstrate to libraries the value of local delivery, with the intrastate connections an added benefit. The number of miles per stop should be small enough at the local level to offset the long route to be run by the connecting truck. The umbrella of a single management structure may allow the economies of the densely library-populated local routes to help subsidize delivery to library-sparse areas. The estimated costs of providing such a service are as follows (based partly on IDS costs reported for 1977):

20 vehicles leased	$ 90,000
Driver salaries - benefits	300,000
Management salaries - benefits	45,000
Gas and oil	30,000
Insurance	12,500
Maintenance	30,000
Food and lodging	3,000
Administrative costs	3,500
	$513,500 or
	20,540 per route

These routes would be structured to offer delivery to all district library center service areas as opposed to present local delivery services which offer service to only 73 percent of the district library centers. (See Map 5, page 46). While it is difficult to determine all the costs involved in present delivery services, our estimate for present costs of local delivery is approximately $260,000. This does not include postage and UPS costs of mailing materials which DLC's and local libraries could expect to be carried on an expanded IDS, both to libraries now unserved by local delivery and to other DLC's in the state. These costs now average $115 for non-member libraries and $735 for IDS member libraries. When possible savings are extrapolated on a statewide level, one can see that the cost of this alternative may not be unreasonable.

The longer routes would cost relatively more to operate than the shorter routes, while the shorter routes would provide more revenue. A delivery service presently operating in the Montgomery County-Norristown Public Library service area, for example, cost $14,214 to run two trucks on a part-time basis with two part-time drivers in 1978.

Whether a series of local delivery routes could maintain themselves is another question. An average route as postulated above would require 40 library stops at $500 apiece to break even. This may not be out of the question in some areas of the state, but in others there may not be 40 libraries. If, for example, a route were run in Montgomery County-Norristown area serving the DLC needs for $14,214, as is presently the case, 12 additional stops at $500 apiece would generate the average route cost of $20,540.

These projections do not take into account the difficulties of crossing jurisdictional barriers that may divide types of libraries and funding agents or library service boundaries between, for example, DLC's and intermediate units.

Management

A full-time central coordinator would be mandatory, answerable to a Board of Directors as at present. An assistant would be necessary to back up coordination of so widespread a system. Individual route management responsibilities of a day-to-day nature may devolve upon the District Library Center as an in-kind portion of its fee for service.

Strengths

1. The statewide benefits of IDS would increase as a unified service combined both local and statewide functions.
2. All types of libraries in a given area could be encouraged to cooperate in resource sharing.

3. Equality of service for all areas of Pennsylvania may be achieved through application of economies of scale and unified planning.

Weaknesses

1. The scale of operation envisaged here would be very unwieldy and difficult to manage.
2. Administrative and jurisdictional barriers that inhibit multi-type cooperation may work against the establishment of such a system.
3. Start-up funding for so massive an operation may be difficult to obtain.

ASSESSMENT

There is no question that a statewide delivery service offers benefits to Pennsylvania libraries. Ninety-three percent of responding libraries who were not members of IDS saw statewide benefits to the system, even though they did not participate.

The question for a funding agency, which is the basic role of the State Library of Pennsylvania in delivery, is what the service is worth on the state scale of library priorities. Interlibrary loan will function without IDS or any other delivery service, as long as the U.S. Postal Service is in operation. The value of IDS is in providing speedy and accurate delivery of materials. In some cases, the speed and accuracy is essential and makes a great deal of difference. A case in point is films. To assure reliable scheduling of films, a quick turn-around and pinpoint schedule is necessary. Delivery by IDS performs a valuable service for films, one that the U.S. mail could never duplicate. The costs of mailing films would be quite high, as well. In 1977, for example, IDS carried a total of 17,626 films from the Pennsylvania Public Library Film Center at Pennsylvania State University. Sent through the mail, these films would cost approximately $8000 for shipping, while the IDS fees of member libraries include film traffic as well as book traffic. Total shipping charges for the Film Center to IDS member libraries were $800 for 1978, and will be $875 for 1979.

Interlibrary loan of books, on the other hand, may be just as acceptable to some through the mails as through a delivery service. IDS may offer what is actually a convenience, not a basic mainstay of library

service. Put simply, is this convenience worth about $50,000 per year to the State Library of Pennsylvania?

The answer, in part, depends on the resources available to the State Library and the alternative applications for the money. At present, state funds are not available to finance interlibrary cooperation. Until they are, only LSCA Title III funds are available. But why do libraries wish to cooperate? According to Pennsylvania librarians, the reason is to share resources. The only way for this to occur is through their location and their transmittal, electronically or physically, from one library to the other. The recent development of OCLC has brought new dimensions to electronic bibliographic access and record transmittal, but the physical transmittal of materials remains in an underdeveloped condition. As access becomes increasingly swifter, the psychological desire increases for swifter delivery. The immediate future will most probably show an increase in interlibrary loans as compared to total traffic and a much greater ability to pinpoint locations nearby. This will result in emphasis on improved delivery. The present performance record of the U.S. Postal Service offers Pennsylvania librarians little hope of swift delivery. The alternative is to use a private carrier. Of the private carriers, the most efficient is IDS.

RECOMMENDATION: It is recommended that the State Library of Pennsylvania continue to subsidize the operation of IDS with LSCA funds until state funds become available for subsidy of the service.

Of the alternatives discussed above, we find Alternative I to be most appropriate to the needs of the state because:

- It links the state's libraries from east to west providing a unifying effect.
- Resource sharing is parceled out among several libraries across the state, all equally accessible via IDS.
- It is a method to reimburse net lenders and offer smaller libraries an effective means of sharing with other libraries.
- It provides quick access to library resources to the people of Pennsylvania.
- The libraries of Pennsylvania control the service.
- It provides a resource sharing network that functions smoothly and meets the needs of member libraries.
- IDS is established and operating well; other alternatives would require delays, dislocations and other costly start-up disadvantages.
- IDS is the most cost-effective alternative as it is currently operating. It provides the most service for the dollars invested.
- IDS provides several services in one to Pennsylvania library users:

    (1) Quick delivery of books and magazines
    (2) A film delivery service
    (3) A support service to education and industry by delivering large quantities of educational and research materials from one library to another.

- It saves money for member libraries in costs of packaging and shipping by other means.
- It saves member libraries money by letting them share costly materials rather than duplicating them.

APPENDIX

September 8, 1978

TO: IDS Board of Directors

FROM: Robert N. Case, Chairman

SUBJECT: AD HOC COMMITTEE: RESPONSIBILITY AND COMPENSATION FOR MANAGEMENT AND COORDINATION

During the past several months the RACMAC Committee has been studying various aspects of managing and coordinating the IDS routes.

In March a management survey was sent to all route managers to determine:

1. Actual time spent on preparing the payroll forms to IDS.
2. Actual cost to prepare a payroll.
3. Actual time spent to prepare monthly reimbursement forms to IDS.
4. Actual cost per month to prepare reimbursement forms.
5. Amount of time used to interview and train route drivers and cost of this time.
6. How much time is devoted to trouble-shooting to service area. What is involved and cost of this time.
7. Is a fixed quarterly fee of $500 fair to library for managing a route.
8. Would a fee based on actual time spent on managing be reasonable.

The results of this survey are attached to this report. There were many variables in the responses. Generally speaking it was shown that with some exceptions most libraries are able to manage an IDS route with little cost and that higher costs are usually attributed to routes where there is considerable driver staff turnover or incompetency. Most libraries believed a fixed fee would be acceptable for managing an IDS route.

In May the Ad Hoc Committee continued to review and discuss route managing. It was felt by the Committee that it would be helpful to spell out the rates and responsibilities of the drivers, route managers and coordinator. The committee invited route managers to this session and gained insight to the general responsibilities deemed essential for the drivers, managers and coordinator. A copy of these findings is attached to this report.

The Ad Hoc Committee further discussed a number of alternatives for IDS in approaching future cost saving decisions. Among these were:

1. Transferring IDS drivers to library managers where management cost were shown to be lower.
2. Combining routes to effect a reduction in leasing costs, personnel cost and management costs.
3. Reduce costs of management fees that more accurately reflect actual cost of IDS for management services.

The following recommendations are submitted:

1. Relocate East II driver from Bucks County Library to Ursinus College.
2. Reimburse route managing libraries $800 annually to manage IDS.
3. Establish a managing contingency fund to be used to reimburse managing libraries for actual management cost exceeding the $800 flat fee.
4. Reorganize west routes to eliminate one driver salary, expenses and fuel and leasing costs.
5. Reduce the time of the coordinator to 2/3 assignment for IDS.

IDS SURVEY

ROUTE MANAGERS

Time Spent Preparing Payroll - yearly

Bucks	$ 25.00	4-1/2 hours per year
Dauphin (2)	149.00	
Cambria	180.00	24 hours per year
Lancaster	42.00	6 hours per year
Aliquippa	72.00	6 hours per year
	$468.00	

Average cost to do payroll $78.00 yearly

Time Spent Preparing Monthly Reimbursement

Bucks	$ 34.00	6 hours per year
Dauphin (2)	45.00	
Cambria	48.00	6 hours per year
Lancaster	42.00	6 hours per year
Aliquippa	72.00	6 hours per year
	$241.00	

Average cost to prepare reimbursement $40.00 yearly

Time Spent Interviewing/Training

Bucks	5 hours per week $40.	$160 monthly	$1,920 yearly
Dauphin (2)			
Cambria			
Lancaster			
Aliquippa	3 hours per week $30.	$120 monthly	$1,560 yearly

Time Spent Troubleshooting

Bucks	5 hours per week	$160.00/month	$1,920 yearly
Dauphin (2)	2-1/2 hours per week	112.50/month	$1,350 yearly
Cambria	3 hours per month	30.00/month	$ 360 yearly
Lancaster	2 hours per month	14.00/month	$ 168 yearly
Aliquippa			

Fixed Fee or Actual Cost

Bucks	Fixed	$1,900-$2,000
Dauphin (2)		$1,600
Cambria	Free membership	$ 588
Lancaster	Fixed	$ 252
Aliquippa	Fixed	$1,704

ROLES AND RESPONSIBILITIES OF IDS FACILITATORS

Role of Drivers

1. Meet prearranged schedules as determined by the IDS Coordinator with recommendation of route manager
2. Make arrangements for emergency repair
3. Contact route manager in emergency if route schedule cannot be met
4. Complete log of daily route
5. Sort, pick up, and delivery delivery items
6. Keep van neat and clean
7. Report to route manager if problems in meeting schedules

Role of Route Managers

1. Interview and hire full-time and relief drivers
2. Train drivers
3. Schedule drivers as required
4. Provide some type of supervision; evaluation of drivers
5. Administer payroll
6. Arrange for local maintenance of vehicles
7. Arrange for a substitute vehicle
8. Prepare reimbursement forms
9. Communicate with IDS members on route

Role of IDS Coordinator

1. Keep financial records and report to IDS Board
2. Pay expenses
3. Present reports to membership
4. Prepare application for funds
5. Promote IDS
6. Conduct meetings for route managers
7. Conduct workshops for membership
8. Serve as liaison from route manager to Board
9. Analyzes monthly usage statistics
10. Approve schedule changes
11. Prepare directories and route schedules
12. Arranges contracts for vehicle leasing and service maintenance
13. Arranges for drivers logding
14. Arranges for public transportation of items
15. Resolves troubleshooting problems of delivery service.